CRM Sales Analysis

Product Performance

Which products have the highest win rate (%) and highest revenue contribution?

Win Rate (%) for Each Product

Product	Win Rate
GTX Plus Pro	49.5
GTX Basic	49.0
MG Special	48.0
GTX Plus Basic	47.2
MG Advanced	46.3
GTK 500	37.5

GTX Plus Pro with a win rate of 49.5% has total revenue of $2,629,651.

It has the highest win rate and revenue. Although it has a relatively low number of deals (968 deals, 479 won deals), it generated the highest revenue and therefore, it is a good performing product.

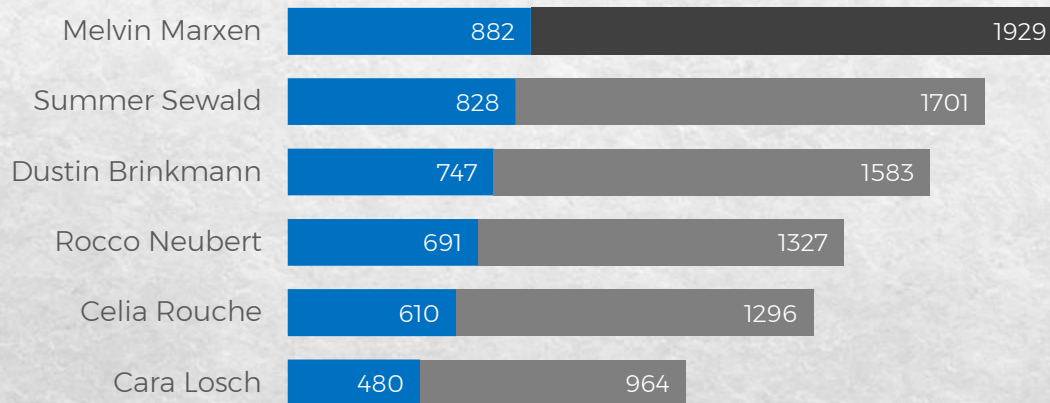## Generated Revenue for Each Product

Product	Revenue
GTX Plus Pro	$2,629,651
MG Advanced	$2,216,387
GTX Plus Basic	$705,275
GTX Basic	$499,263
GTK 500	$400,612
MG Special	$43,768

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Top Performing Sales Teams
Which Sales Team is the Best Performing Team?

Total Deals vs Won Deals by Sales team

■ Won Deals ■ Total Deals

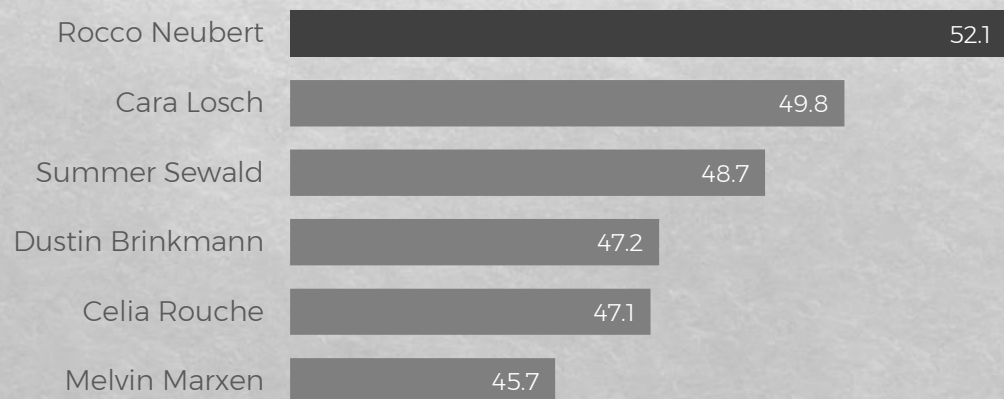| Sales Team	Won Deals	Total Deals
Melvin Marxen	882	1929
Summer Sewald	828	1701
Dustin Brinkmann	747	1583
Rocco Neubert	691	1327
Celia Rouche	610	1296
Cara Losch	480	964

The team led by Melvin Marxen in the Central region closed the highest total deal value $2,251,930 and a win rate of 45.7%.

Win Rate(%) by Sales Team

Sales Team	Win Rate (%)
Rocco Neubert	52.1
Cara Losch	49.8
Summer Sewald	48.7
Dustin Brinkmann	47.2
Celia Rouche	47.1
Melvin Marxen	45.7

The Rocco Neubert led team in the East region has the highest win rate of 52.1% and a total deal value of $1,960,545.

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Sales Agent Performance

Which sales agents have closed the most deals and who are those lagging behind?

Agent Win Rate (%)

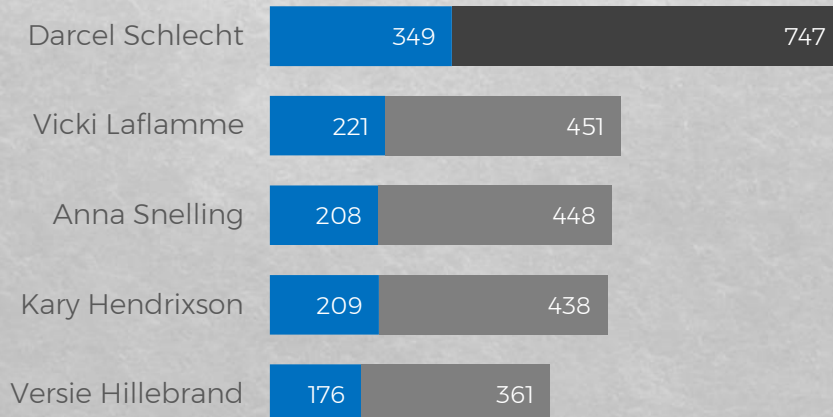| Agent	Win Rate
Reed Clapper	65.4
Garret Kinder	61.0
Donn Cantrell	57.5
Hayden Neloms	53.0
Cecily Lampkin	52.7

Reed Clapper closed the most deals with a win rate of 65.4% having won 155 deals out of 237 deals

Total Deals vs Won deals

■ Won Deals ■ Total Deals

Top 5 Agents

Agent	Won Deals	Total Deals
Darcel Schlecht	349	747
Vicki Laflamme	221	451
Anna Snelling	208	448
Kary Hendrixson	209	438
Versie Hillebrand	176	361

Bottom 5 Agents

Agent	Won Deals	Total Deals
Elease Gluck	80	177
Rosie Papadopoulos	78	160
Rosalina Dieter	72	160
Garret Kinder	75	123
Wilburn Farren	55	110
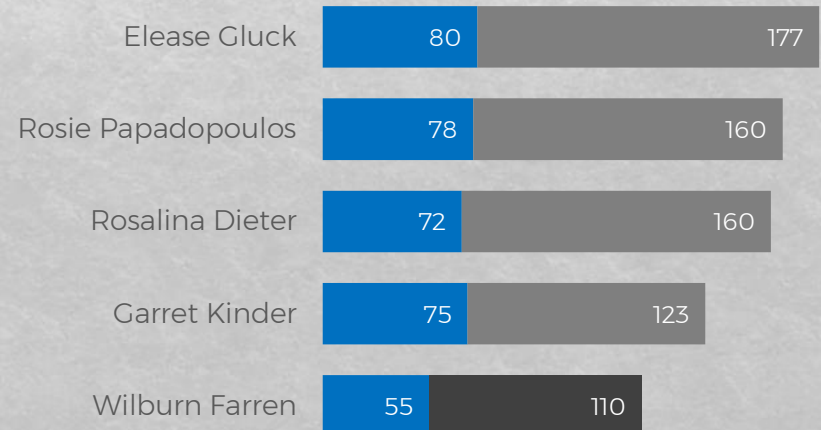
Monthly Deals & Revenue Trend

How does the number of deals and revenue trend across months?

Total Deals vs Deals Won & Revenue Trend

Mar Apr May Jun Jul Aug Sep Oct Nov Dec

1 2 3 4

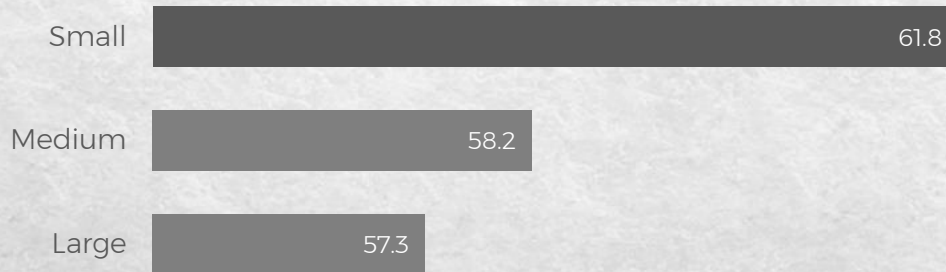■ Won Deals ■ Total Deals —•— Revenue

The number of deals and revenue **peaks quarterly** particularly at the end of each quarter, suggesting seasonal trends or successful campaigns.

Impact of Company Size

Does company size have effect on win rate?

Win Rate (%) per Company-Size Category

Category	Win Rate (%)
Small	61.8
Medium	58.2
Large	57.3

- **Small** companies have higher win rate (61.8%) despite having the lowest number of deals and won deals.

- **Medium** and **large** companies converts more deals than small businesses.

Deals vs Won Deals per Company-Size Category

■ Won Deals ■ Total Deals

|	Large	Medium	Small
Total Deals	6789	416	170
Won Deals	3891	242	105

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Sales Cycle Duration

How long does it typically take for a deal to move from "*Engaging*"
to "*Won*" or "*Lost*"?

47 Days

Deals take 47 days on average to close, with variations by product & team.
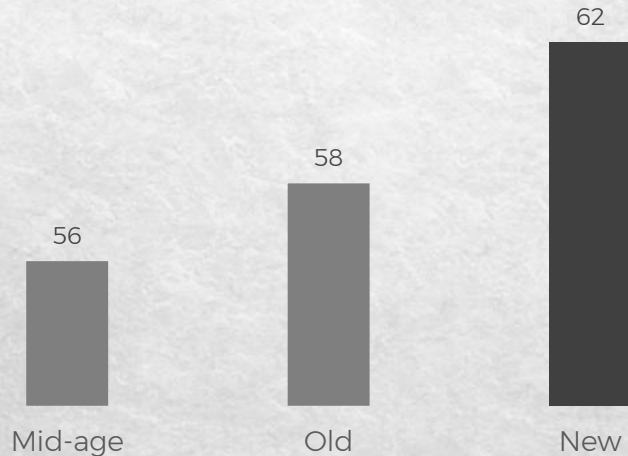
Average Sales Duration by Agents

Agent	Days
Cecily Lampkin	38
Boris Faz	43
Daniell Hammack	44
Zane Levy	44
Reed Clapper	44
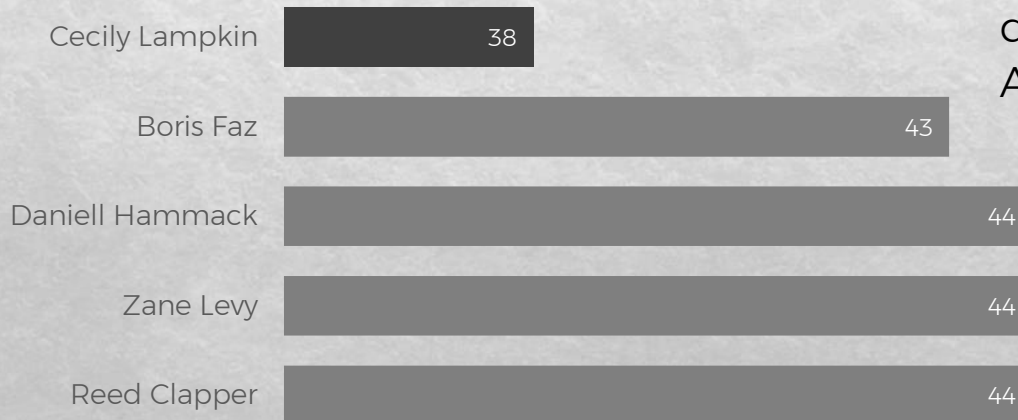
Cecily Lampkin closes her deal in the least possible Average of 38 days

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Account Age & Win Rate
Are newer accounts more likely or less likely to close deals?

Win Rate (%) by Account-Age

62

58

56

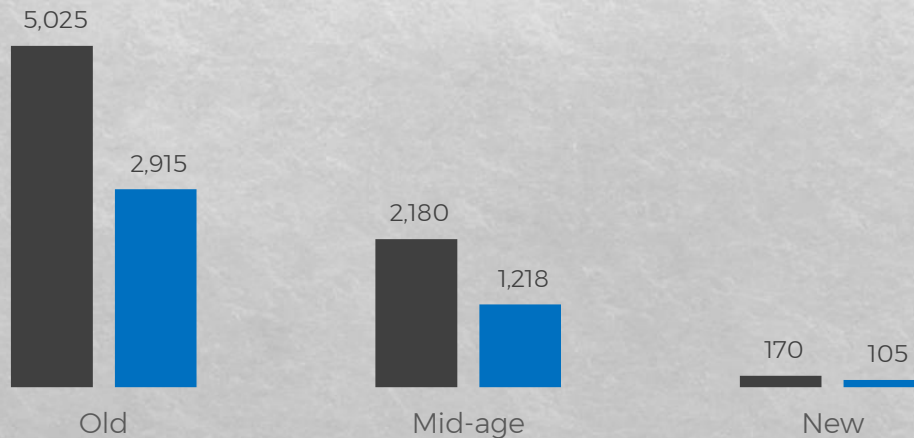Mid-age   Old   New

Newer accounts (post-2015) have better conversion than older ones with a **62%** win rate.

Deals vs Won Deals

■ Won Deals   ■ Total Deals

5,025

2,915

2,180

1,218

170   105

Old   Mid-age   New

Old accounts have closed significantly higher deals (2,915 won deals) compared to **Mid-age** (1,218 won deals) and **New** accounts (105 won deals)

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Recommendations & Conclusion

RECOMENDATIONS

1. **Encourage Knowledge Sharing**: Have high-performing teams share their tips and strategies with others.

2. **Focus Where It Matters**: Put more effort into top-performing products and newer accounts.

3. **Plan by the Calendar**: Use past trends to time promotions and campaigns around quarter-ends.

4. **Agent Support**: Keep track of agent performance regularly and offer support where needed.

CONCLUSION

This report shows clear opportunities for the company to grow its revenue and improve sales efficiency. By learning from successful teams, focusing on what sells best, and planning around seasonal trends, the business can become more strategic and effective in how it sells computer hardware to other companies.

Dataset: Maven Analytics

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